

CHAPTER 7: SOCIO-ECONOMIC

Introduction

- 7.1 This chapter assesses the impact of the proposed development on socio-economics and tourism. In particular, it considers the potential effects of the proposed development during the construction phase and the operational phases.
- 7.2 During the construction phase the potential effects considered include:
- The provision of temporary employment for the construction works at a local level; and
 - Temporary, local spending relating to construction activity.
- 7.3 During operation the potential effects considered include:
- Local employment both in terms of direct on-site employment, as well as indirect and induced off-site employment;
 - Increase in visitors to the local area and associated increase in visitor expenditure;
 - Synergy with the wider local regeneration and economic development aims
- 7.4 All effects are measured at the level of Staffordshire Moorlands district (i.e. local level), however it may well be the case that visitors may base themselves at Moneystone, and visit attractions outside of the district, thus creating positive impacts in a wider area as well.
- 7.5 The chapter describes the methods used to assess the impacts, the baseline conditions currently existing at the site and surroundings, the potential direct and indirect impacts of the development arising from the factors identified at paragraphs 7.2 and 7.3 above, and the mitigation measures required to prevent, reduce, or offset any adverse impacts and the residual impacts. The chapter has been authored by Regeneris Consulting Ltd.

Planning Policy Context

National Planning Policy

National Planning Policy Framework (2012)ⁱ

- 7.6 The National Planning Policy Framework (NPPF) (March 2012) replaced the suite of national Planning Policy Statements, Planning Policy Guidance notes and some circulars with a single document. At the heart of the plan is a presumption in favour of sustainable development and private sector led growth is encouraged.
- 7.7 The key points of the NPPF are:
- Development plans should identify a broad range of sites for economic development, and avoid carrying forward existing allocations without evidence of need and a reasonable prospect of their take-up during the plan period.
 - Development plans should provide a portfolio of land that supports existing business sectors and plans for new or emerging ones. Flexible policies are needed to respond to changing economic circumstances.
 - Every effort should be made objectively to identify and then meet the housing, business and other development needs of an area, and respond

positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of the residential and business communities.

- Planning policies should support economic growth in rural areas in order to create jobs and prosperity by taking a positive approach to sustainable new development.

7.8 In order to help achieve economic growth, local plans should:

- Set out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth. Local plans should set criteria, or identify strategic sites, for local and inward investment to match the strategy and to meet anticipated needs over the plan period;
- Support existing business sectors, taking account of whether they are expanding or contracting and where possible identify and plan for new or emerging sectors likely to locate in their area. Plans should be flexible enough to allow a rapid response to changes in economic circumstances.
- Plan positively for the location, promotion and expansion of clusters or networks of knowledge driven, creative or high technology industries;
- Identify priority areas for economic regeneration, infrastructure provision and environmental enhancement; and,
- Facilitate flexible working practices such as the integration of residential and commercial uses within the same unit.
- Support the sustainable growth and expansion of all types of business and enterprise in rural areas, both through conversion of existing buildings and well-designed new buildings.
- Support sustainable rural tourism and leisure developments that benefit businesses in rural areas, communities and visitors. This should include supporting the provision and expansion of tourist and visitor facilities in appropriate locations where identified needs are not met by existing facilities in rural service centres

Localism Actⁱⁱ

7.9 The Coalition Government's approach to planning has been focused on applying principles of 'localism' to give local authorities greater autonomy in planning for housing and employment land. A key change has been to allow local authorities to set local housing targets in their development plans. Local authorities will be responsible for setting employment land requirement figures for their Local Plan. Local land targets are now tested through the Local Plan process and local authorities will need to collect and use reliable information to justify employment land supply policies.

Plan for Growthⁱⁱⁱ

7.10 Against a backdrop of faltering economic growth, the Chancellor's 2011 Budget focused on the long-term rebuilding of Britain's economy. HM Treasury introduced 'The Plan for Growth' (March 2011), a strategy document outlining their ambitions to put the UK on a path to sustainable, long-term economic growth. The document affirmed the Budget's objectives of creating a stronger and more sustainable economy, with growth more evenly shared across the country and between different sectors. The tourism sector was identified as one of the eight sectors of the economy as the focus of the Growth Review with regards to removing the barriers to growth and achieving economic growth.

- 7.11 The Ministerial Statement on Planning for Growth (March 2011), set out the steps the Government expects local authorities to take to help secure a swift return to economic growth: *“the Government’s top priority in reforming the planning system is to promote sustainable economic growth and jobs...the answer to development and growth should be yes, except where this would compromise the key sustainable development principles set out in national planning policy”*. The strategy represented a devolvement of power and responsibility for growth to local communities, giving them the opportunity to promote approaches to economic development most suitable to their local environment.

Local Planning and Economic Development Policy

Staffordshire Moorlands Core Strategy (2014) iv

- 7.12 The Local Development Framework is a district wide development plan which replaces the Staffordshire Moorlands Local Plan and provides a framework for delivering development across the district to 2026. The Core Strategy, alongside The Statement of Community involvement and the Biddulph Town Centre Area Action Plan, are the District Council’s LDF documents that have been produced and adopted to date. The Core Strategy is the key LDF document and is a plan which influences how and where the Staffordshire Moorlands will develop in the future.
- 7.13 The Strategy outlines a number of significant opportunities and challenges facing the district which will drive the necessary changes to bring about sustainable improvements in the social, economic and environmental conditions of the district. The “need to meet the requirements for housing and employment provision” is identified as a key challenge across the district, as well as addressing the “pockets of socio-economic deprivation with lower than average economic activity rates, low income and high unemployment, a declining workforce and a high degree of out-commuting which is both highly unsustainable and undermines the local economy” (chapter 3).
- 7.14 The strategy also identifies tourism as a key opportunity and “one of the areas where the district can have a major role in the sub-region to help bring more people in and diversify its economy.” Developing the district’s tourism sector is outlined as a key driver for economic growth where tourism can play a major role in “providing opportunities for jobs, attracting investment and bringing in wealth” (chapter 3) as well as support the objective of tackling social exclusion and economic decline in rural areas.
- 7.15 The Strategy’s vision sets out the direction in which the Council will take the district in reaching local objectives and “seeks to drive forward change and address the key challenges the district faces” (para 4.1). A key message from the vision which is of particular relevance to the proposed development is to provide access to suitable local jobs and a range of recreational, cultural and leisure opportunities. The vision also states that “tourism will be a key element in the diversification of the district’s economy and will also contribute significantly to raising the environmental quality and the regeneration of the district” (chapter 4).
- 7.16 The spatial aims set out how the district can achieve its vision by 2026 and sets out a number of spatial objectives to support the district in doing so. Of particular relevance to the proposed development is SO6 “to maintain and promote sustainable regenerated rural areas and communities with access to employment opportunities, housing and services for all” and SO7 “to support and enhance the tourism, cultural, recreation and leisure opportunities for the district’s residents and visitors.”

- 7.17 Under Policy SS5a and SS7 the Churnet Valley Tourism Corridor is identified as a major sustainable tourism corridor and it states that developments that enhance tourist facilities in the area and increase “tourist opportunities for visitors through additional high quality accommodation, promoting links with the Peak District and the development of new tourist attractions linked to the Churnet Valley tourist corridor” will be supported.

Staffordshire Moorlands Sustainable Community Strategy (2008)

- 7.18 The Sustainable Community Strategy sets a long-term vision and plan for bringing about a sustainable improvement in the social, economic and environmental conditions of the Staffordshire Moorlands up to 2020. The Sustainable Community Strategy Vision is that:

"By 2020 Staffordshire Moorlands will be recognised as a vital part of a regenerated North Staffordshire sub-region. All our communities will enjoy an excellent quality of life, including access to affordable housing and excellent public services. Our vibrant market towns will be home to a range of successful retail, visitor and knowledge based businesses. We will have a highly skilled and entrepreneurial workforce. Our natural environment will be protected and our carbon emissions reduced."

- 7.19 The Strategy outlines some of the necessary steps that need to be taken in order to achieve this vision. One of which is to “enhance conditions for business growth and sustainability” and more specifically “realise the potential for tourism and visitor related businesses.” The focus on improving access to employment opportunities and the potential of the tourism sector in enabling growth in employment and business opportunities is reiterated throughout the Strategy.

High Peak and Staffordshire Moorlands Employment Land Requirement Study (2014)¹

- 7.20 The Employment Land Study provides a review of commercial property and existing employment land across the district and identifies future business needs and employment forecasts over the next 15 years.
- 7.21 Overall the study states that “Staffordshire Moorlands has a low supply of available employment land and potential losses may require the re-provision of employment land elsewhere in the district to cater for retained and future job growth” (para 9.41). The Study reveals that the district has a low level of employment land, office and vacant industrial floorspace and over the period from 2000- 2012 experienced a 13% decline in industrial/ commercial floorspace.
- 7.22 The district is reported to require between 25ha to 45ha (gross) to meet employment land needs in Staffordshire Moorlands up to 2031. The study also concludes that “the council should adopt a proactive approach to managing and improving the existing portfolio of employment sites to facilitate future growth” (para 9.65).

Staffordshire Moorlands Tourism Study (2011)

- 7.23 The Tourism Study aims to provide an appraisal of the role and impact of the visitor economy of Staffordshire Moorlands and “identify the opportunities for

¹ Nathaniel Lichfield & Partners (2014): *Employment Land Requirement Study*

economic growth based on the visitor economy, with particular emphasis on the Churnet Valley corridor." The Study outlines that despite the strong presence of two strong tourism brands (Alton Towers and the Peak District) Staffordshire Moorlands district does not operate as a significant tourism destination or brand, while factors such as a limited accommodation offer outside the Peak District National Park and within proximity to Alton Towers area are considered to be limiting its strength as a tourist destination.

- 7.24 The Churnet Valley is outlined as having significant visitor potential for the district. The study outlines a number of potential developments for the district's visitor economy that would support the aim of attracting more visitors and getting them to spend more time in the valley. Leisure development at Moneystone Quarry is outlined as one of the major transformational projects across the district in supporting the development of the visitor offer. The study outlines that the projects would have a significant impact on the tourism economy across the Staffordshire Moorlands district "either in terms of direct impact or in terms of catalysing wider development."
- 7.25 For tourism projects to fully realise their potential the study stresses the importance that they are teamed with "cross-cutting actions that enhance the overall quality of the visitor experience." Key actions include developing new and improving the existing major attractions/ attractors and enhancing the accommodation stock.

Churnet Valley Masterplan SPD (2014) v

- 7.26 The Churnet Valley Masterplan provides a framework for future development in the Churnet Valley and outlines opportunities and measures to support the regeneration of the area and manage its important rural base around sustainable tourism.
- 7.27 Sustainable tourism is a key principle of the Masterplan with the objective "to retain the economic and social advantages of tourism development while reducing or mitigating any undesirable impacts on the natural, historic, cultural or social environment" (para 5.1.2). In achieving sustainable tourism in the Churnet Valley the Plan outlines a number of key challenges which may limit the impact of local tourism. Some of the challenges of particular relevance to the proposed development are:
- Improving the accommodation offer in terms of range and quality throughout the valley;
 - Developing visitor hubs, where people can access, explore and discover in a way that enriches the visitor experience but does so with the least impact on the environment and community;
 - Extending the season that visitors want to experience the area, working to support businesses develop offer for the period October- Easter.
- 7.28 The proposed development at Moneystone Quarry has the potential to support the Churnet Valley in its development as a visitor attractor and in overcoming a number of key challenges facing the local tourism sector.
- 7.29 The masterplan also identifies a number of opportunities across the Churnet Valley in working towards achieving sustainable tourism. The proposed development has the potential to support the following opportunities as outlined in the Plan:

- Promoting a number of gateway visitor hubs based on existing centres of interest from which visitors can explore the local area.
 - Developing the visitor offer aimed primarily at the countryside market including families under the framework of Wise Growth².
 - Increasing overnight stays.
- 7.30 The Masterplan principles are stated to be the foundation of the plan and shape the way in which the Churnet Valley will be managed. Principle three and five of the Masterplan are to: "Support the local enterprise and create local employment opportunities" and "Deliver quality and sustainable tourism". The proposed development supports the overarching principles which shape the plan.
- 7.31 The Plan outlines a number of key opportunity sites which have or play a key role in delivering the strategy. Moneystone Quarry is identified as an opportunity site with potential of creating a high quality leisure venue to complement other recreational and leisure attractions. The Plan states that the development "needs to be of a scale which does not undermine the tranquillity and character of the sensitive part of the Churnet Valley and other businesses" (para 7.6.5).

Approach

Assessment Methodology

- 7.32 The assessment considers the likely temporary socio-economic effects during the construction of the proposed development together with the ongoing effects experienced once the development is completed and is fully operational.
- 7.33 The proposed development is situated to the south of Staffordshire Moorlands district. The effects of the development are measured at this geographical level. The majority of the socio-economic effects are expected to occur within the district. Some data has also been gathered for the CAS wards or Lower Super Output Areas which are closest to the proposed development site to inform the baseline analysis. The potential impacts which have been assessed are:
- **Construction employment:** the proposed development would generate temporary employment and economic effects during the construction phase; both directly through the employment required for on-site construction and through the supply chain of contractors.
 - **Operational employment:** once operational the development will support a range of on and off-site jobs.
 - **Visitor volume and value:** the development could impact upon the size and value of the tourism economy in the local area.
- 7.34 The datasets which were drawn upon in the socio-economic baseline and in the impact assessment include:

² Wise Growth tourism principles: Inclusive, engaging, well-being, caring, distinctive, fun and appealing, viable, efficient.

- The 2011 Census (ONS)
- The Business Register and Employment Survey (ONS)
- The Annual Business Inquiry (ONS)
- Jobs Density (ONS)
- 2015 Indices of Deprivation (DCLG)
- DWP Job Seekers Allowance Claimants (DWP)
- UK Business Counts (IDBR)
- Annual Survey of Hours and Earnings (ONS)
- Staffordshire Moorlands tourism assessment (value and volume) (TRS)
- Great Britain Tourism Survey

7.35 As well as datasets, the assessment has drawn on other evidence and research:

- Construction impacts associated with the proposed development (both on-site and through the supply chain) have been assessed using indicative construction costs (estimated by cost consultants), plus benchmarks for the ratio of construction employment to output.
- Operational impacts have been assessed by drawing on the research Regeneris Consulting has undertaken for similar leisure development projects based on the experiences of existing operators such as Center Parcs. This evidence base was also used most in work to support the planning application for the Land & Lakes proposals at Penrhos, Anglesey. The Feasibility Study prepared by Christie & Co^{vi} for the Applicant has also informed assumptions used in the impact modelling, particularly around visitor effects.

Significance Criteria

7.36 The assessment of socio-economic effects has been based on a widely used and accepted methodology which considers the sensitivity of the receptors and the magnitude of the impacts of the proposed development on these receptors, informed using a series of indicators. The significance of each effect is then determined by considering both the sensitivity of the receptor and the magnitude of the impact.

7.37 The defined receptors for this assessment are:

- **The local economy** – a receptor which describes the health of the local economy in terms of employment and labour market participation. Indicators for this receptor include employment rates, economic activity rates, and employment totals (including for the tourism sector specifically).
- **The local visitor economy** – a receptor which represents tourism assets and infrastructure in the area and visitor economy employment. Key indicators for this receptor include the volume and value of tourism activity, and the number visitor attractions (including accommodation) locally.

7.38 These receptors have been chosen because they are specific and measurable, and they will be impacted upon by the proposed development. The significance of the effects of the proposed development on these receptors will be assessed at the Local Authority District level (Staffordshire Moorlands).

7.39 The indicators proposed for assessing the sensitivities of the receptors and the magnitudes of the impacts are quantifiable and use familiar units of measurement. The key indicators are:

- Construction Sector employment rate
- Overall (all sector) employment rate
- Economic activity rates
- Volume and value of tourism

7.40 The assessment of significance takes into consideration the scale of the impact (magnitude), and assesses this against the socio-economic conditions described in the baseline section. The magnitude of impact is assessed on a scale of **negligible** to **high**. Thresholds used in the assessment of the magnitude of change are not uniform – they reflect the different nature of the indicators.

7.41 The importance attached to the receptors within local policy is used to inform their sensitivities. This takes account of local circumstances and the strategic importance attached to each receptor in local and district level economic development and regeneration policy. The assessment draws on analysis within the socio-economic baseline about the scale of these receptors. The sensitivity of the receptors is assessed on a scale of **negligible** to **high**, depending on the importance attached to the receptor in policy and the degree of evidence of socio-economic challenges, weaknesses or underperformance.

7.42 Assessments of magnitude and sensitivity are combined, as shown in the following table, to determine the significance of the effects.

Table 7.1: Matrix of Significance for Assessment of Socio-Economic Effects

| Sensitivity of Receptor | Magnitude of Impact | | | |
|-------------------------|---------------------|-----------------|-------------------|------------|
| | High | Medium | Low | Negligible |
| High | Major | Moderate/ Major | Moderate/ Minor | Negligible |
| Medium | Major/ Moderate | Moderate | Minor | Negligible |
| Low | Minor/ Moderate | Minor | Negligible/ Minor | Negligible |
| Negligible | Negligible | Negligible | Negligible | Negligible |

Source: Regeneris Consulting

7.43 The assessments of significance can be interpreted as follows:

Table 7.2: Descriptions of Significance for Socio-Economic Effects

| Significance | Description/Criteria |
|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Major | The proposals would cause a major change to existing socio-economic conditions in terms of absolute and/or percentage change. They would also be a major contributor to meeting an identified policy need locally. Significance will be assessed as either beneficial or adverse. |
| Moderate | Proposals would cause a moderate change to existing socio-economic conditions in terms of absolute and/or percentage change. They would also be a moderate contributor to meeting an identified policy need locally. Significance will be assessed as either beneficial or adverse. |
| Minor | Proposals would cause a minor change to existing socio-economic conditions in terms of absolute and/or percentage change. They would also be a minor contributor to meeting an identified policy need locally. Significance will be assessed as either beneficial or adverse. |
| Negligible | No discernible change in baseline socio-economic conditions or |

| | |
|------------------------------|-----------------------------------------------------------------------------------------------------|
| | contribution to policy need locally. Significance will be assessed as either beneficial or adverse. |
| Source: Regeneris Consulting | |

Assumptions/Limitations

- 7.44 Data availability limits the ability to measure some indicators at the local level. In particular, indicators for measuring the volume and value of the visitor economy in Staffordshire Moorlands have relied on assessments prepared by consultants on behalf of Staffordshire Moorlands District Council in 2012. These assessments are not directly comparable with wider statistics on tourism and the visitor economy prepared regionally or nationally, or with previous reports for the local area prepared by different consultants. However, they provide the most up to date available local analysis.
- 7.45 The assessment of employment impacts, visitor number and visitor expenditure has been informed by research and analysis from similar facilities elsewhere in the UK that are already operational (e.g. Center Parcs, Bluestones), as well as the feasibility work prepared by Christie & Co^{vii}.
- 7.46 Assumptions in the assessment of effects are made explicit under the assessment of each potential effect. The techniques used are considered to be appropriate and proportionate. As such, no limitations are identified.

Baseline Conditions

- 7.47 This section describes the baseline conditions at the site (and surrounding area as appropriate).

Population and the Labour Market

- 7.48 The most recent Census showed that Staffordshire Moorlands had 97,100 residents in 2011. Of these, 62.5% (60,725) were of working age (16-64). This was a lower proportion than for the county as a whole, and lower than the regional and national working age percentages. However, the overall economic activity rate of Staffordshire Moorlands’ working age population (the proportion either in work or actively seeking work) was 1 percentage point higher than the regional average - though slightly below the county and national averages – at 69.3%. Over three quarters of the district’s working age residents were in employment – a high proportion relative to the average share for the county and region as a whole.

Table 7.3: Labour market indicators, 2011

| | Staffordshire Moorlands | Staffordshire | West Midlands | England |
|------------------------------------------------------------------|-------------------------|---------------|---------------|------------|
| Population | 97,100 | 848,500 | 5,602,000 | 53,010,500 |
| % Working Age (16-64) | 62.5% | 63.8% | 63.6% | 64.8% |
| Economic Activity Rate | 69.3% | 69.8% | 68.3% | 69.9% |
| Employment Rate | 76.0% | 73.5% | 68.4% | 70.3% |
| Unemployment Rate (%16-64 years measured by APS) | 3.3% | 3.6% | 5.1% | 4.4% |
| Claimant count (% 16-64 years measured by JSA)* | 0.7% | 0.9% | 2.2% | 1.7% |
| Source: Census, 2011.*JSA based on average monthly rate for 2015 | | | | |

- 7.49 The unemployment rate for Staffordshire Moorlands is low compared to elsewhere in the region at just 3.3% (of 16-64 year olds). For the wards closest to the proposed development, the unemployment rate varies notably – Churnet has a rate of 2.0%, whereas Alton and Cheadle North East have rates of 4.5% and 4.8% respectively.
- 7.50 Looking at recent trends over time using the Annual Population Survey (APS), the unemployment rate has been rising steadily over time before reaching a peak in 2012 when approximately 11% of the population aged 16-64 are estimated to have been unemployed during the year, which was notably higher than the Staffordshire rate. This has since fallen to around 4%, in-line with the rate for Staffordshire and slightly lower than the national rate.
- 7.51 Since 2005, APS estimates indicate that the economic activity rate in the district has tended to be above the England average. However, during 2013 it was measured around 2 percentage points lower than the national average at 75%.
- 7.52 Over the last 6 years since 2009 the economic activity rate has averaged 80% - around 5 percentage points higher than the regional average over the same period. In terms of unemployment, the average rate is in line with the county average at around 6%, but lower than the regional and national averages of 8% and 7% respectively.
- 7.53 The Job Seekers Allowance (JSA) claimant count rate for the district (the number of people seeking work but receiving out of work benefits) was relatively low in 2015 compared to the typical proportion of working age residents claiming these benefits in the wider geographical areas. The latest data from April 2015 show the rate is around 0.7% (390 residents), lower than the national and regional rates (1.4% and 1.8% respectively) The claimant count rate of the whole of 2015 was 0.7% in the district, compared to 1.2% in the previous year.
- 7.54 In April 2016 around 105 residents in Staffordshire were seeking work in construction and development trades. These unemployed residents would be available to take up positions involved in the construction of the proposed development. This figure has historically been higher - the average monthly figure during 2015 was 180 residents.
- 7.55 There were also 65 residents in Staffordshire seeking work in accommodation and food services sector. The number of jobs in this sector would increase as a result of the proposed development and would be available to locally unemployed residents.
- 7.56 Including those seeking work in construction and accommodation services there were 340 residents of the district seeking work in semi-skilled or elementary occupations. It is likely that the range of on-site employment at the proposed development will require skills of this nature, and will therefore be available to local unemployed residents.

Employment & Business Units

- 7.57 The latest survey data indicates that there are around 28,800 employees in Staffordshire Moorlands district, representing 1.2% of all employees in the region. Since 2009 this number has remained fairly stable (0.5% increase) , at a time when regionally and nationally employment has been increasing modestly.

- 7.58 The loss of employment measured over the last 10 years has been substantially greater in the Staffordshire Moorlands district in proportionate terms than for the county as a whole, and the West Midlands. This is in contrast to England where over this same period employment has increased by over 4%.
- 7.59 Average annual change in employment since 1998 has been fairly stagnant on average and employment levels have yet to return to pre-recession levels in the district. Nationally, average annual change has been notable higher over this same period.

Table 7.4: Change in Employment Levels

| | Staffordshire Moorlands | Staffordshire | West Midlands | England |
|-------------------|--------------------------------|----------------------|----------------------|----------------|
| Employees (2014) | 28,800 | 329,600 | 2,412,900 | 24,299,900 |
| 3yr Change | +4.7% | +6.1% | +4.8% | +5.3% |
| 5yr Change | +0.5% | +4.6% | +4.8% | +5.4% |
| 10yr Change | -1.4% | -0.8% | -0.3% | +4.4% |
| Av Annual Change* | +0.2% | +0.2% | +0.1% | +0.7% |

Source: Business Register and Employment Survey (2009-14), Annual Business Inquiry (1998-2008). Data rounded to nearest 100. Some trend data for the Local Impact Area is not shown in the table due to the fact that changes to geographical classifications mean that measurements over time would not be on a consistent basis. *1998-2014.

- 7.60 There are fewer jobs in the district of Staffordshire Moorlands compared to the resident population than in other areas of the country. Staffordshire Moorland’s jobs density ratio³ was 0.64 in 2014 – far lower than the regional figure of 0.78 and the national average of 0.83. This points towards a relative shortage of jobs in the area, and significant levels of out-commuting.
- 7.61 Approximately 33% of employees in the district are part-time. This is higher than the regional and national average proportion of 31% and indicates potential underemployment in the local labour market with employees unable to secure full-time positions.

³ Jobs density is the total number of filled jobs in an area (workplace-based measure of jobs and comprises employees, self-employment jobs, government-supported trainees and HM Forces) divided by the resident population of working age (including unemployed and economically inactive) in that area.

Table 7.5: Employment by Sector in Staffordshire Moorlands

| | Employees (FTEs, 2014) | Change 2009-2014 | Change 2009-2014 (%) | Share of Total Jobs | Location Quotient * (Eng) |
|----------------------------------------------------------------|-------------------------------|-------------------------|-----------------------------|----------------------------|----------------------------------|
| Agriculture, forestry & fishing (A) | <100 | - | - | <1% | 0.1 |
| Mining, quarrying & utilities (B,D and E) | 400 | +100 | 19% | 2% | 1.4 |
| Manufacturing (C) | 4,400 | +300 | 9% | 18% | 1.9 |
| Construction (F) | 1,100 | -300 | -20% | 5% | 1.0 |
| Motor trades (Part G) | 500 | +100 | 42% | 2% | 1.0 |
| Wholesale (Part G) | 800 | -700 | -46% | 4% | 0.8 |
| Retail (Part G) | 1,900 | +400 | 26% | 8% | 0.9 |
| Transport & storage (inc postal) (H) | 800 | -100 | -12% | 3% | 0.7 |
| Accommodation & food services (I) | 1,000 | -200 | -15% | 4% | 0.7 |
| Information & communication (J) | 300 | - | - | 1% | 0.3 |
| Financial & insurance (K) | 1,400 | -1300 | -48% | 6% | 1.4 |
| Property (L) | 300 | - | 12% | 1% | 0.7 |
| Professional, scientific & technical (M) | 800 | +100 | 9% | 3% | 0.4 |
| Business administration & support services (N) | 1,900 | +1,100 | 133% | 8% | 0.9 |
| Public administration & defence (O) | 500 | -600 | -52% | 2% | 0.5 |
| Education (P) | 2,000 | -100 | -6% | 8% | 1.0 |
| Health (Q) | 2,800 | +400 | 17% | 12% | 1.0 |
| Arts, entertainment, recreation & other services (R,S,T and U) | 3,100 | +800 | 35% | 13% | 3.2 |
| ¹ Tourism ^{*1} | 3,700 | +1,100 | +24% | 15% | 2.3 |
| Total | 24,100 | - | - | | |

Source: Business Register and Employment Survey (2009-14). Employment measurement is Full-time Equivalent employees = FT jobs + 0.5*PT jobs. Letters refer to SIC categories. Data rounded to nearest 100. Figures may not sum due to rounding. *measures the relative concentration of the sector compared to England. An LQ of >1 signifies a greater than average share of employment is in this sector. ¹not included in totals.

- 7.62 The Accommodation and food services sector contains a small share of employment in the district and furthermore has contracted since 2009, with around 200 jobs being lost. Only 4% of jobs are in this sector compared to 6% of jobs nationally. In contrast, other sectors such as business and support services and arts, entertainment and recreation have seen strong growth in absolute terms. The latter contains 13% of all jobs in the district, almost three times the regional and national average share of 4%. The significance of this sector is highlighted by its LQ of 3.2. Other key sectors are finance and insurance, manufacturing and mining & quarrying (each having an LQ of much greater than 1).
- 7.63 Analysis of BRES data shows that almost 15% of FTE employees in the district (3,700) are employed in tourism related industries (See table 7.5). This is over double the county and national share of 7% and far higher than the regional

average of 5%. Over 4,500 jobs (part-time, full-time and self-employed) are in the tourism sector in total.

- 7.64 A similar share of all businesses belong to the tourism sector in Staffordshire Moorlands as in the region and country as a whole (around 7%). There are approximately 295 tourism businesses in the district, of which 25 are situated in close proximity to the proposed development⁴.
- 7.65 The district contains many more agricultural businesses than is typical for an area, which has around 925 local units in the agricultural sector. It contains fewer retail, ICT and professional services firms as a share of all business units than average for the region.

Table 7.6: Local Business Units

| | Local Area* | | Staffordshire Moorlands | | W Midlands | England |
|----------------------------------------------------------------|----------------------|------------|-------------------------|------------|------------|------------|
| | Local Business Units | % | Local Business Units | % | % | % |
| Agriculture, forestry & fishing (A) | 70 | 18% | 925 | 20% | 6% | 4% |
| Mining, quarrying & utilities (B,D and E) | 5 | 1% | 25 | 1% | 1% | 1% |
| Manufacturing (C) | 30 | 8% | 300 | 7% | 7% | 5% |
| Construction (F) | 55 | 14% | 490 | 11% | 10% | 10% |
| Motor trades (Part G) | 10 | 3% | 155 | 3% | 4% | 3% |
| Wholesale (Part G) | 20 | 5% | 180 | 4% | 5% | 4% |
| Retail (Part G) | 25 | 6% | 340 | 7% | 11% | 10% |
| Transport & storage (inc postal) (H) | 15 | 4% | 210 | 5% | 4% | 3% |
| Accommodation & food services (I) | 15 | 4% | 260 | 6% | 6% | 6% |
| Information & communication (J) | 5 | 1% | 130 | 3% | 5% | 7% |
| Financial & insurance (K) | 5 | 1% | 60 | 1% | 2% | 2% |
| Property (L) | 5 | 1% | 85 | 2% | 3% | 4% |
| Professional, scientific & technical (M) | 40 | 10% | 455 | 10% | 13% | 16% |
| Business administration & support services (N) | 40 | 10% | 320 | 7% | 8% | 8% |
| Public administration & defence (O) | 0 | 0% | 40 | 1% | 1% | 1% |
| Education (P) | 10 | 3% | 105 | 2% | 3% | 2% |
| Health (Q) | 15 | 4% | 215 | 5% | 6% | 6% |
| Arts, entertainment, recreation & other services (R,S,T and U) | 30 | 8% | 240 | 5% | 6% | 7% |
| Tourism* ¹ | 25 | 6% | 295 | 7% | 7% | 7% |
| Total | 395 | 100 | 4,535 | 100 | 100 | 100 |

Source: UK Business Counts – Local Units (via NOMIS), 2015. A local unit is an individual site (for example a factory or shop) associated with an enterprise. Letters refer to SIC categories. *the middle layer super output area which contains the proposed development. *¹not included in totals. Data rounded to nearest 5.

⁴ Staffordshire Moorlands 012 middle layer super output area

Travel to Work

- 7.66 Data released from the Census 2011 shows that Staffordshire Moorlands is a net out-commuting district. In 2011, around 8,000 people commuted into the district to work, whereas almost double that amount (15,900) of people commuted out from their residence in the district to work elsewhere in the region. This is more than the number of people that live and work in the district (15,400).
- 7.67 Data from the previous 2001 Census highlights the different commuting patterns of residents of Staffordshire Moorlands who work in the food and accommodation sectors⁵. In that year, 75% of residents working in that sector were employed within the district – a much greater proportion than the average for all sectors (50%). This highlights that jobs in tourism related sectors tend to employ people who live more locally.

Table 7.7: Travel to Work Flows, 2011 (People)

| Out commuting (15,900) | In commuting (8,000) |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
| Stoke-on-Trent (9,500) | Stoke-on-Trent (5,200) |
| Newcastle-under-Lyme (2,100) | Newcastle-under-Lyme (1,200) |
| East Staffordshire (1,700) | Stafford (700) |
| Stafford (1,600) | East Staffordshire (600) |
| Birmingham (100) | South Staffordshire (100) |
| <i>Net Outflow – 7,900</i> | |
| Source: Census 2011 (ONS). Note: numbers may not sum due to rounding. Only the 5 destinations with the greatest in and out-flows included in table. Totals only measure in and out commuting to and from district in the West Midlands region, not nationally. | |

- 7.68 Given that it is the closest urban economic area to the district, Staffordshire Moorland’s closest commuter linkage is with Stoke-on-Trent where 60% of all out-commuters travel to, and 65% of in-commuters originate from.
- 7.69 The data indicates that the size of the labour force in the district far outweighs the supply of jobs available to local residents.

Deprivation

- 7.70 In the 2015 Indices of Deprivation, which measure relative deprivation across England using a range of indicators, Staffordshire Moorlands district is ranked as the 203rd most deprived local authority district (out of 326), placing it in the 50% least deprived local authorities in the country (below average deprivation). This rank is an average of each of the individual LSOA rankings within the district. Looking at the LSOA’s in closest proximity to the proposed development site, the majority (5 out of 6) are in the top third least deprived LSOAs.

Tourism Assets, Visitor Volume and Spend

- 7.71 Staffordshire Moorlands commissioned an assessment of tourism in 2012 which was conducted by The Research Solution (TRS) market research agency using a model developed by Geoff Broom Associates in partnership with the Regional Tourism Boards. Impact estimates were based on a range of nationally published

⁵ Data from 2011 is not yet available.

tourism datasets, combined with local intelligence on accommodation stock and visitor attractions in order to apportion the regional impacts to the local area.

- 7.72 The key findings were that 4.1m tourism trips occurred in the district during that year, of which 3.9m were day visitors and the remainder involved an overnight stay. This volume of tourism was associated with £177m of expenditure in the district over the year. Of this total, approximately £41m was from overseas visitors. This level of expenditure supported around 3,100 jobs directly with an additional 550 multiplier jobs.
- 7.73 Clearly day visits constitute the largest component of tourism trips to Staffordshire Moorlands (and are estimated to account for over three-quarters of tourism expenditure in the district⁶). This is largely driven by the presence of Alton Towers theme park which attracts around 2.4 million visitors per year. Other assets which attract visitors to the area are the natural environment, suitable for a variety of outdoor leisure activities including walking, cycling and horse-riding. The inland water bodies of Rudyard Lake and Tittesworth Reservoir are also popular. Across the wider Staffordshire County Council area, other key visitor assets are Tamworth Snowdome, Waterworld Waterpark, The Trentham Estate, and Uttoxeter Racecourse⁷.
- 7.74 Of the estimated 4.1m million trips in 2012, 95% were day trips and did not involve an overnight stay. The current volume of holiday breaks in the district is therefore modest. Just over half (51%) of staying trips involved a hotel stay, and a quarter (24%) involved camping. Research has suggested that the low amount of overnight stays could be due to a shortage of quality accommodation in the area^{viii}. Staffordshire County Council has expressed its belief that the current accommodation stock is not of high enough quality to satisfy demands for overnight hotel visits to the district^{ix}. The proximity of the Peak District National Park, a popular destination for holiday stays, is also likely to be an explanatory factor for the relatively low levels of overnight leisure tourism in the district. As only 25% of the Peak District is within Staffordshire Moorlands, most of the accommodation in the Park will be situated outside of the bounds of the district.
- 7.75 It was estimated that 50% of the overnight trips component of tourism visits was driven by visits to Alton Towers. Most of the expenditure and jobs supported by this major attraction is assumed to be retained within the immediate site, with rates of extender trips and off-site visits being low.
- 7.76 The GB Day Visitor Survey gives an indication of average visitor spend in the district from day trips. Day visitors to Staffordshire Moorlands spend on average £33.50 in 2013. This was slightly under the West Midlands average of £36.30 but in line with the England average of £33.60. Estimates from TRS research, which differentiate between town visits and countryside visits, are similar - £29.90 for countryside day trips and £44.80 for town day trips.
- 7.77 For overnight stays, expenditure is substantially greater for overseas visitors. Spend per visit and spend per night from domestic tourists is slightly greater for holiday tourism than business and tourism. At £51-56, average spend per night is estimated to be much greater than average day visit spend.

⁶ *ibid*

⁷ Note that Destination Staffordshire do not record visitor numbers for attractions.

Table 7.8 Visitor Expenditure

| | Domestic | | Overseas | |
|--------------|-----------------|-----------------|-----------------|-----------------|
| | Spend per Visit | Spend per Night | Spend per Visit | Spend per Night |
| All Holidays | £157 | £56 | £300 | £51 |
| Business | £152 | £50 | £400 | £90 |
| VFR | £80 | £30 | £307 | £26 |
| Other | £86 | £48 | £407 | £26 |

Source: Staffordshire Moorlands Tourism Economic Impact Assessment, 2012

- 7.78 According to the latest national survey data, the number of tourism trips and the average level of expenditure from all types of tourism has been increasing in recent years, particularly in the period immediately following the recession when a higher proportion of domestic holidaymakers opted for a ‘staycation’ rather than travelling abroad due to pressures on disposable incomes. As well as increases in the volume of domestic tourism trips, average expenditure per trip in particular has risen substantially since the recession, driven by increases in visitors’ average length of stay and average spend per night.
- 7.79 Tourism in the district has grown in volume recently due to the rising popularity of ‘staycations’, short breaks and activity tourism. Visitor growth is expected to increase in the near future as these trends continue^x. Research undertaken in relation to the proposed development also confirms this important trend^{xi}.
- 7.80 Data indicates that tourism across the wider area has shown positive trends in recent years in terms of spend. Figures from a national survey of domestic overnight tourism^{xii} show that although the number of trips has fallen, tourism spend in the West Midlands has increased year-on-year between 2010 and 2014 to £1,153 million (+16%).

Table 7.9 Regional Trends in Overnight Tourism

| | 2010 | 2011 | 2012 | 2013 | 2014 | % Change |
|----------------|-------|-------|-------|-------|-------|----------|
| Trips (m) | 7.88 | 8.21 | 8.5 | 9.02 | 7.25 | -8 |
| Nights (m) | 20.9 | 19.4 | 20.7 | 20.7 | 17.3 | -17 |
| Spend (£m) | 1,078 | 1,111 | 1,234 | 1,318 | 1,153 | +7 |
| Spend/Trip (£) | 137 | 135 | 145 | 146 | 159 | +16 |

Source: GBTS, 2010-14

- 7.81 Compared to England as a whole, spend per trip is lower in the West Midlands (at £159 compared to £289 nationally). Average spend per trip was also been rising nationally in recent years, from £168 in 2010. Average spend per holiday trip is estimated by TRS to be around £157 in Staffordshire Moorlands (domestic visitors).

Characteristics

- 7.82 The district contains around 2,600 bedspaces in serviced accommodation, and around 1,500 pitches for tents and caravans. Table 7.10 shows that these are by far the most popular accommodation types for visitors to the district. The

geographical distribution of this capacity is concentrated in a few locations. Many of these bedspaces are located in the Peak District National Park area.

Table 7.10 Accommodation Stock in Staffordshire Moorlands

| Accommodation Type | Capacity |
|------------------------|-----------------|
| Hotel/Guesthouse/Inns | 2,600 bedspaces |
| Bed & Breakfast/Farms | 352 bedspaces |
| Self-Catering | 200 units |
| Touring Caravans/Tents | 1,477 pitches |
| Static Van | 302 pitches |
| Group Accommodation | 435 bedspaces |
| Second Homes | 163 units |

Source: Staffordshire Moorlands Tourism Economic Impact Assessment, 2012

- 7.83 Almost half of the accommodation offer in the district is serviced. Just over a quarter of UK visitors stay in campsites, whereas the overwhelming majority of overseas visitors stay in serviced or self-catered accommodation types.

Table 7.11 Overnight Trips by Accommodation Type and Visitor Origin

| | UK | | Overseas | | Total | |
|-----------------------------|----------------|-------------|---------------|-------------|----------------|-------------|
| | No. | % | No. | % | No. | % |
| Serviced accommodation | 85,000 | 44% | 10,500 | 65% | 95,500 | 46% |
| Self Catering | 27,000 | 14% | 3,000 | 19% | 30,000 | 14% |
| Touring caravans/tents | 51,000 | 27% | 600 | 4% | 51,600 | 25% |
| Static vans/holiday centres | 13,000 | 7% | 0 | 0% | 13,000 | 6% |
| Group/campus | 5,000 | 3% | 400 | 2% | 5,400 | 3% |
| Second Homes | 4,000 | 1% | 700 | 4% | 4,700 | 2% |
| Other | 7,000 | 4% | 1,000 | 6% | 8,000 | 4% |
| Total | 192,000 | 100% | 16,200 | 100% | 208,200 | 100% |

Source: Staffordshire Moorlands Tourism Economic Impact Assessment, 2012

- 7.84 Domestic holiday visitors' spend per visit is higher on average than that of domestic business visitors. Overseas holiday visitors spend on average twice the amount domestic holidaymakers, but have a similar level of nightly expenditure, as they tend to stay for a longer period. Much of the hotel accommodation (approximately 800 bedspaces) is likely to be accounted for by the Alton Towers resort⁸ - about 31% of the district's bed spaces.

Potential Impacts

- 7.85 This section of the ES summarises the likely impacts arising during the construction and operation of the proposed development, and assesses the significance of the effects of these impacts.

⁸ The Alton Towers Hotel and Splash Landing resort together contain 391 bedrooms. Assuming a conservative bedspace to bedrooms ratio of 2:1, this implies around 800 bedspaces.

Construction Phase

- 7.86 Estimated construction costs give a good indication as to the likely construction employment supported temporarily during the construction phase of the proposed development.
- 7.87 The total anticipated construction costs of the proposed development are approximately £18m. These estimates have been prepared for the Applicant by NBDA – costs consultants. Some of the main areas of expenditure include:
- Around £5m associated with the infrastructure works for the pitches for the 250 lodges. It is anticipated that these works will be undertaken on a phased basis, with around 80 pitches developed per year over a three year period⁹.
 - Around £0.95m will be spent on other groundworks/infrastructure (e.g. car parking and landscaping).
 - Around £9.1m will be spent on building the Park's core leisure facilities and amenities.
 - Around £2.9m spent on fit out, contingencies and professional fees.
- 7.88 It is assumed that the majority of the expenditure (£14.6m or c.80%) will be defrayed in a 12 month construction period. This will include the construction of the main park leisure facilities and hub building, some site infrastructure, and a first phase of lodge pitches (c. 80 pitches). It should be noted that the lodges will be fabricated off-site and will be brought on-site for each phase, so no costs have been provided for this¹⁰. The remaining expenditure on pitch infrastructure for subsequent phases will be defrayed over the next 2-4 years (i.e. a 3-5 year construction period in total depending on visitor demand).
- 7.89 Using benchmark evidence developed by the Department for Communities and Local Government (CLG) and Offpat^{xiii} on the level of construction output (or turnover) which supports 1 full-time equivalent (FTE) construction job, we estimate that the development as a whole could support up to 280 full-time equivalent person years of construction employment.
- 7.90 Based on the above phasing, this will yield around **230** FTE construction jobs in Year 1, reducing to **12-25** FTE construction jobs in Years 3-5 for the provision of further pitches.
- 7.91 This total estimate of construction jobs comprises a mixture of on-site works and off-site pre-fabrication and supply chain activities (exc. lodge manufacture). The works which particularly lend themselves to local procurement/recruitment include:

⁹ However, this rate of development will be dependent on the commercial success of the Park's first phase.

¹⁰ While no costs have been provided, the expenditure on purchasing lodges will support labour both in the manufacture of the lodges off-site and in their installation (e.g. transportation and on-site installation is assumed to be part of the manufacture contract). However, at this stage it is unclear where the lodges will be manufactured. It is likely to be outside of Staffordshire Moorlands district, with a provider in the UK or internationally. Given the jobs supported through this process are most likely to be supported outside of the local area, these labour impacts have not been considered as part of this assessment.

- Ground preparation and land remediation contracts
- Basic civil engineering works
- Construction of the hub building and other park facilities
- Site landscaping

7.92 The above assessment does not include all of the wider benefits of construction activity (for example, further lower tiers of the supply chain, induced expenditure). There can be significant multiplier effects from construction activity both in terms of the businesses that supply goods and services to contractors, while the expenditure on food and sometimes accommodation from the people working on developments can also benefit local businesses.

7.93 The significance of the construction phase effects on the local economy have been assessed as follows:

- The demand for construction jobs is a direct, temporary impact which will affect the employment rate for the construction sector over the period of the development. While unemployment is relatively low in the district (0.7% on average in 2015 compared to 1.7% nationally), reducing unemployment, and particularly youth unemployment, is afforded high priority in local strategy and policies.
- Analysis of Job Seekers Allowance (JSA) claimant data for Staffordshire Moorlands district shows that, on average, over the last year (2015) there were around 15 unemployed people per month seeking construction related employment, and around 180 per month across the county. Total employment within the construction sector in the district has fallen by around 20% since 2009 (-300 FTE jobs). While this does not appear to have translated into a significant increase in the level of JSA claimants seeking construction jobs in the district, it is likely that many of these construction workers may well have re-entered the labour market outside of the district (i.e they travel further to work). The proposed development provides an opportunity to work on a major local construction project.
- Taking into consideration the above, the sensitivity of the receptor is therefore considered to be **high**.
- The construction activity associated with the proposed development will lead to approximately 230 FTE construction jobs in Year 1 of the construction process, while a further 12-25 FTE construction jobs would be supported to implement further phases of lodges in next 2-4 years (depending on visitor demand). Employment will be greater during the first phase of the development, when the majority of the infrastructure, the site facilities, and first phase of lodge accommodation are developed. While these jobs will be spread across both on-site and off-site roles, the proposed development will require a range of construction workers, each year, as the development progresses.
- While dependent on the procurement processes deployed, and given the scale of the construction business base (14% of all enterprises in the district) and workers (1,100 FTEs) within the district, it is likely that a proportion of construction workers would be sourced from within the district. This is underpinned by evidence from a comprehensive economic impact analysis on the construction and operation of a Center Parcs holiday villages suggests that around 25% of all construction expenditure benefits local construction contractors^{xiv}.

- The magnitude of the employment impacts is therefore considered to be **low** for the district.
- 7.94 The significance of the effect on the performance of Staffordshire Moorland's local economy is therefore considered to be **moderate/minor beneficial** in the short term (the construction period).

Completed Development – Operational Phase

Visitor Economy Effects

Visitor Numbers

- 7.95 The Applicant commissioned a feasibility study for the proposed development by Christie & Co, specialist advisors in the visitor and leisure market. The study was comprehensive and provides insights and analysis about the local area, an overview of the proposed resort, a review of the UK holiday centre market, competitor analysis, projections of demand (including average occupancy) and pricing, and projections of income and expenditure.
- 7.96 Given the site's location, Christie & Co's analysis identifies that the proposed development would attract visitors, mainly families and groups, from up to a 2-3 hour drive time. These visitors would be seeking an eco/forest-based short-break (3/4 nights) or holiday (7 nights) destination, with the opportunity to participate in a broad range of both indoor and outdoor activities on-site as part of their visit. The consultants note that visitors staying for shorter breaks are less likely to go off-site to find the majority of their entertainment and activities, given the scale of the provision available on site (e.g. both day and evening based). However, given the close proximity and access to the Peak District National Park and to attractions such as Alton Towers, some visitors may choose to spend time and money outside of the resort. Those visitors who stay for longer periods, and particularly those who may have travelled further to visit, are more likely to do this, given the duration of their stay.
- 7.97 The feasibility study does not provide a view on total annual staying visitors. However, for the purposes of projecting demand, income and expenditure estimates, the study provides a view on lodge occupancy levels in a stabilised year of operation (i.e. once the site is fully developed and marketed after 5 years) and 'lodge nights'. The stabilised annual occupancy is assessed as being 67%. Information provided in the feasibility study has therefore been used to estimate total annual staying visitors.
- 7.98 Given the resort will have 250 lodges and will be open all year, the total number of available lodge nights is 91,250. Based on a 67% occupancy, this equates to 61,138 occupied lodge nights per annum. While lodges will vary in size from 1-bed to 6-bed, using Christie & Co's average occupancy of 4 visitors per lodge, this equates to a total of 244,500 visitor lodge nights per annum¹¹.
- 7.99 To convert total annual visitor lodge nights to total staying visitors, information provided on a stabilised operational year for 3, 4 and 7 night lodge bookings has been used. Given some lodges can be occupied twice in one week as a result of

¹¹ The operator of the resort may decide to offer a proportion of the lodges for private sale to provide an initial capital return. However, this element of the business model has not been determined. If this did materialise the lodges could well still be used as rental stock and marketed by the operator, or marketed independently by the private owner. As such, the visitor estimates are based on an assumed 250 lodges being occupied for 67% of the year.

short stays, and using an average occupancy of 4 visitors per lodge, it is estimated that the resort would attract **55,400 staying visitors per annum**. Around three-quarters of visitors would be staying at the resort as part of 3 or 4 night breaks, and a quarter would be staying for a week.

- 7.100 An alternative approach to 'sense-check' this level of annual staying visitors is to compare the number of visitors estimated for Moneystone with those estimated for the Penrhos holiday lodge resort scheme in Anglesey. Based on feasibility work prepared for the Penrhos scheme, similarly for both weekly and dual lodge lettings, an annual 'visitors per lodge ratio' of 226 staying visitors was estimated. Applying this to the proposed 250 lodge scheme at Moneystone implies annual staying visitors would be in the order of 56,500 – a very similar estimate to that derived using the above approach.
- 7.101 This estimate of annual visitor numbers (55,400) staying at Moneystone is a gross impact for the Staffordshire Moorlands visitor economy. However, given the market analysis prepared by Christie & Co there are no similar lodge parks of this kind within the district, and generally evidence points to a limited supply of quality visitor accommodation for the short-break market in the district. By developing Moneystone as a lodge resort, the Applicant is looking to shape, via its eco-forest based activities and the catchment area it expects to draw visitors from, a new visitor destination within the district with a markedly different offer. Therefore, in light of existing visitor accommodation supply in the district, and the Applicant's vision for the market the resort will serve, no displacement adjustments have been made.
- 7.102 While at an early stage of business planning, the day visitor market is also a consideration for the Applicant. Initial work by Christie & Co to inform transport modelling for the proposed development estimates that around 390 vehicles could be attracted to the resort to use the facilities per week, or 20,300 vehicles annually. Without any further market analysis on the types of visitor attracted (size of group/activities sought/length of stay etc) it is challenging at this stage to develop a robust estimate of potential day visitors. However, if an average car occupancy of 1.6¹² is used, a further **32,500 day visitors** could potentially be attracted annually. However, Christie & Co's analysis points to day visitors potentially being largely local/sub-regional visitors visiting for a day out, but also as single purpose visits to make of the sites recreation facilities (e.g. gym, bars and restaurants), given the existing lack of this type of provision in the local area.

Visitor Expenditure

- 7.103 Visitor expenditure can be split into both on and off-site expenditure. We have focussed here on the total off-site expenditure of visitors.
- 7.104 Annual off-site expenditure in the district for staying visitors has been estimated at **£1.03m per annum**. This injection of off-site expenditure is relatively modest and based on an average off-site spend per booked lodge¹³. While longer staying

¹² ONS National Travel Survey, 2012. The average car occupancy of 1.6 has been used as day visitors could be a mix of leisure visitors or single purpose visitors (e.g. gym attendees).

¹³ This has been estimated using evidence from a 2005 report by Sheffield Hallam University, 'The Local Economic Impact of Center Parcs Holiday Villages'. The SHU report quoted PACEC 1991 Center Parcs research which found that each holiday unit/lodge spent approximately £30 off-site as part of their stay. Regeneris has brought this 1991 expenditure up to 2013/14 prices, reflecting inflation. In current prices this would be around £50 per unit per booking. Given the Moneystone development will provide opportunities for visitors to go off-site to visit nearby attractions, average off-site expenditure of at least £75 per lodge may be achievable. The estimate of £1.03 is based on 13,840 lodge bookings per annum.

visitors may have a greater propensity to go off-site and explore the local and wider area, those visitors on short-breaks are visiting to make the most of the resort setting and on-site amenities.

7.105 The initial feasibility work points towards day visitors being likely to be local residents making use of the outdoor and indoor recreation facilities, as well as many visitors being single purpose visitors (e.g. gym members, local residents eating out etc). As such, their off-site expenditure on their way to the facility cannot be considered as new or additional expenditure for the district. Off-site expenditure from day visitors is therefore not included in the assessment.

Visitor Economy - Significance

7.106 The significance of the effects on the visitor economy of Staffordshire Moorlands have been assessed as follows:

- The proposed development and the new visitors, particularly staying visitors, it attracts to the district is a direct, permanent impact which meets a recognised policy/strategic need in the local area for an improved accommodation offer and in helping to sustain and grow the visitor economy.
- Taking into consideration the above, the sensitivity of the receptor is therefore considered to be **high**.
- The district currently has a very low level of overnight visitor stays currently (c. 200,000 per annum) and few high quality accommodation providers of this scale or offer. The annual 55,400 gross additional visitors, their on-site expenditure, and the £1m of off-site expenditure is considered to be of **high** magnitude.

7.107 The significance of the effect on the performance of Staffordshire Moorland's visitor economy is therefore considered to be **major beneficial** in the long term.

Operational Phase Employment Effects

Permanent on-site Jobs

7.108 While the broad parameters of the proposed scheme have been identified and a feasibility study carried out, a detailed operational plan was not available for review. This is typically undertaken to establish the operational employment requirements for the resort across a range of areas (e.g. management, catering, bar, housekeeping, activities instructors, maintenance etc.) and take into account seasonality. However, without this business planning, the scale of permanent on-site jobs has been estimated based on evidence gathered from a number of Centre Parcs.

7.109 Regeneris Consulting has previously collected good quality evidence from a number of Centre Parcs and from the Bluestone National Park Resort in Wales. Whilst the range of on-site facilities differs across the locations, the broad offer at each is not dissimilar to that proposed at Moneystone. The table below shows the ratio of FTE (full time equivalent) jobs at each facility and their size in terms of number of lodges. The average overall ratio is **1.2 FTE jobs per lodge**.

Table 7.12 Past Evidence on Employment Ratios

| Location | Lodge Units | On-site FTE staff | Ratio (jobs per lodge) |
|------------------------------------------------------------------------------------------------------------------------|-------------|-------------------|------------------------|
| Center Parcs - Elveden | 817 | 1,011 | 1.2 |
| Center Parcs - Longleat | 751 | 955 | 1.3 |
| Center Parcs - Whinfell | 814 | 906 | 1.1 |
| Center Parcs - Sherwood | 813 | 917 | 1.1 |
| Bluestones | 280 | 300 | 1.1 |
| Average | | | 1.2 |
| Source : Center Parcs Economic Impact Report 2005 (by Sheffield Hallam University), plus Regeneris Consulting research | | | |

- 7.110 Given the Center Parcs data was drawn from 2005 it may be the case that certain productivity and efficiency gains have now materialised. There may also be some differences in the business model at Moneystone compared to these facilities around lodge housekeeping. Housekeeping accounts for a significant number of jobs at these facilities given the intensive changeover periods deployed between bookings. Therefore in light of this, it is judged prudent to lower the staff to lodge ratio from 1.2 to 1.0.
- 7.111 Based on the 250 lodge development this would equate to **250 FTE on-site jobs** supported across a range of occupations. Given the nature of the roles available at the resort and the working hours required (i.e. flexible shift patterns) it is anticipated that the number of actual on-site jobs could be in the region of 375 actual jobs, comprising 125 full-time and 250 part-time posts.
- 7.112 One of the key benefits of the scheme will be that the jobs created will be accessible to local people. This was borne out in the experience of Center Parcs where Sheffield Hallam University's research showed that around 85% of all staff resided within 12 miles of the facility. The proposed development will create jobs which have localised travel to work patterns and which have low barriers to entry and a range of flexible working opportunities. This is particularly important in addressing local unemployment, particularly for younger people. According to a national survey, 31% of retail and leisure sector jobs belong to employees under the age of 25; this compares to 13% across all sectors in the economy. Providing more jobs for young people is a key current local and national issue.

Off-site Jobs

- 7.113 In total we estimate there will be **78 additional FTE jobs** created off-site elsewhere in Staffordshire Moorlands district and in wider areas as a result of the proposed development's operational impacts.
- 7.114 In part these will be created via (i) corporate supply chain expenditure – so called indirect jobs supported via purchases of goods and services by the operator; and (ii) the additional expenditure of direct and indirect workers locally on convenience, comparison and leisure goods – which supports induced jobs. Official guidance from UK government on the multiplier effects of development projects suggests that a combined induced plus indirect multiplier of 0.25 would be reasonable for an area such as Staffordshire Moorlands and adjoining areas – meaning that for every 4 FTE jobs created on site a further 1 will be created off site. This would support an additional **63 FTE posts off-site**.

7.115 The development would also yield a total off-site annual expenditure by visitors of £1.03m. Based on a turnover per FTE estimate of £65,000 for the tourism sector, a further **16 FTE off-site tourism sector jobs** supported.

Employment Effects - Significance

7.116 The significance of the employment effects on the local economy of Staffordshire Moorlands have been assessed as follows:

- The proposed development and the generation of new jobs, both part-time and full-time, is a direct and permanent impact which will meet a recognised policy/strategic need in the local area for the creation of new employment opportunities in a rural district. As such, the sensitivity of the receptor is therefore considered to be **high**.
- The 250 FTE permanent on-site jobs (375 actual jobs) and the further 78 indirect and induced FTE jobs supported off-site are considered to be of **medium** magnitude
- The significance of the effect on the performance of Staffordshire Moorland's local economy is considered to be **moderate/major beneficial** in the long term.

Wider Effects

7.117 The development of Moneystone as a major visitor attraction in the district has the potential to deliver some wider and catalytic effects for the local area.

7.118 Major investments, like that proposed here, often serve as a catalyst for further rounds of investment in the local area. Leisure operators have a clear criteria for investment in new locations or formats, taking account of the presence and strategy of complementary operators. The proposed Moneystone development can serve as a demonstrator to others about the opportunities for developing/growing the visitor market and economy in this area. In particular, in growing the staying visitor market and increasing visitor expenditure.

7.119 Specific catalytic developments which could occur include:

- Investment in new/upgraded visitor accommodation in the vicinity of the site
- Local food and retail investment to capture enhanced visitor spend
- Other investments in attractions as the project demonstrates success in drawing large volumes of higher spending visitors to this part of Staffordshire.

Mitigation Measures

7.120 This section describes the measures which are required to mitigate any significant environmental impacts.

Construction

7.121 No mitigation measures are necessary given that the socio-economic impacts have been judged to be of **moderate-minor beneficial** significance.

Completed Development

7.122 No mitigation measures are necessary given that the employment effects have been judged to be of **moderate-major beneficial** significance, while the visitor economy effects have been judged to be of **major beneficial** significance.

Residual Impacts

7.123 For both the construction and completion of the proposed development, the residual impacts are identical to those described in the potential impacts section since no mitigation measures are required for any of the socio-economic receptors.

Conclusions

7.124 The proposed development has been assessed as having a number of significant beneficial impacts for the Staffordshire Moorlands district area during the construction phase (moderate-minor beneficial significance) and the operational phase (moderate major and major beneficial significance). The main impacts include:

- The construction phase would support 230 FTE construction jobs in the first year, and a further 12-25 FTE jobs for a further 2-4 years (depending on visitor demand).
- Once fully developed, and in its steady-state year, the resort would attract 55,400 staying visitors per annum, while a further 32,500 annual day visitors could also potentially be attracted.
- Off-site visitor expenditure from staying visitors would be in the order of £1m per annum.
- The resort would support 250 FTE on-site jobs across a range of roles with the potential for flexible working arrangements. A high proportion of these jobs will be accessible to local people.
- A further 78 indirect and induced FTE jobs would also be supported as a result of the proposed scheme.
- The development of Moneystone as a major visitor attraction has the potential to deliver some wider and catalytic effects for the local area. This could include investment in new/upgraded visitor accommodation in the vicinity of the site; local food and retail investments to capture enhanced visitor spend; and further investments in attractions as the project demonstrates success in drawing in large numbers of visitors to the area.

ⁱ Department for Communities and Local Government (2012) *National Planning Policy Framework*, DCLG, London.

ⁱⁱ UK Parliament (2011); *Localism Act*

ⁱⁱⁱ BIS/HM Treasury (2011); *The Plan for Growth*

^{iv} Staffordshire Moorlands district council (2014); *Core Strategy Development Plan Document, Adopted Version*

^v Staffordshire Moorlands district council (2014); *Churnet Valley Masterplan SPD*

^{vi} Christie & Co (2013); *Proposed Development Moneystone Park – Feasibility Study (Draft)*

^{vii} Christie & Co (2013); *Proposed Development Moneystone Park – Feasibility Study (Draft)*

^{viii} Christie & Co (2013); *Proposed Development Moneystone Park – Feasibility Study (Draft)*

^{ix} Staffordshire County Council (2009); *Tourism in Staffordshire and Stock-on-Trent – Fact Sheet*

^x Team (2009); *Staffordshire Moorlands Tourism Study*

^{xi} Laver Leisure (2011); *Moneystone Quarry - Leisure and Tourism Development Summary Report*

^{xii} VisitEngland, VisitScotland, VisitWales (2012); *Great Britain Tourism Survey*

^{xiii} DCLG/OffPAT (2010); *Calculating Construction Jobs - Paper OSG 07 12 09 Item 4b*, DCLG, London

^{xiv} Sheffield Hallam University (2005); *The Local Economic Impact of Center Parcs Holiday Villages*